Chapter 2

Documents

Chapter Topics

Saving Documents Prior to Attaching 2-3

Document Attachment & Deletion.....2-5

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Saving Documents Prior to Attaching

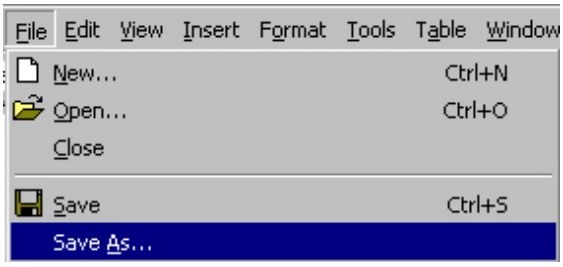
While the NYSTEP System accepts attached documents from all software extensions, the Department of Civil Service is only able to access documentation from the following software extensions: JPEG (*.jpg), GIF (*.gif), Microsoft Word (*.doc), Rich Text Format (*.rtf), Text (*.txt), Adobe (*.pdf), Microsoft Excel (*.xls), and HTML (*.htm, *.html).

Therefore, to avoid having Civil Service contact you to reattach a document (and slowing down the approval process), if a document has been created in another format, please convert it to one of the acceptable formats before attaching it to a transaction.

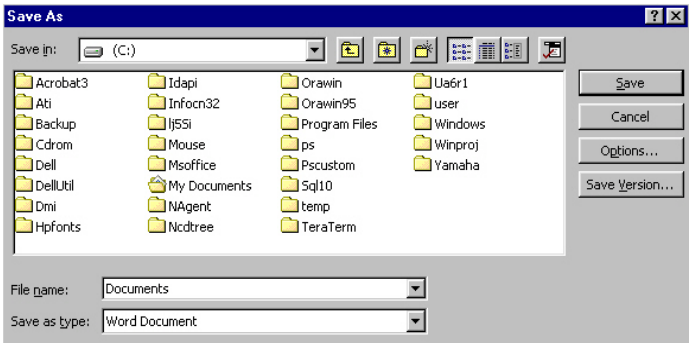
NOTE: WordPerfect files must be saved as an *.rtf file, Visio as a *.jpg file, and Bitmap as a *.jpg file.

Steps to convert a file

1. Open the document to be converted.
2. From the toolbar click **File**, **Save As**.



A Save As dialog box will appear.



3. In the **Save in** dropdown box, select the drive and folder to which the file should be saved.

4. Double click on the folder to which the file should be saved.

5. In the **File name** dropdown box, enter the name of the document to be saved.

6. In the **Save as type** dropdown box, click the and select one of the accepted types of software extensions.

7. Click **Save**.

NOTE: This procedure will save the document with its new extension while keeping the document with the old extension.

Document Attachment & Deletion

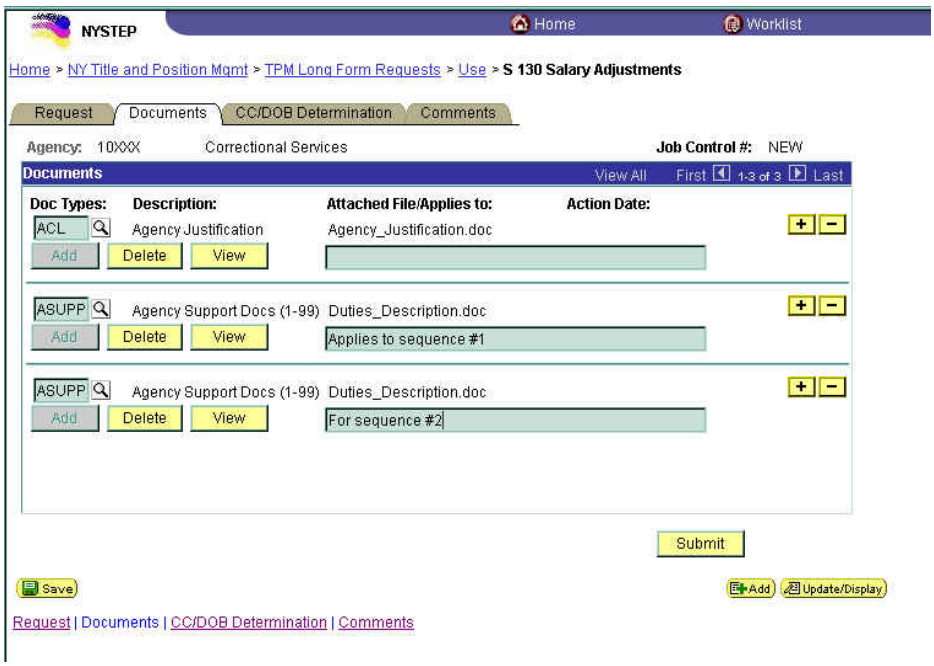
The directions below describe how to attach documents to any transactions that may require supporting documentation as outlined by an agency's C&C Analyst. The following page is the second tab of a transaction request.

REMINDER: Before documents can be attached, they must be in an acceptable format as described earlier in this chapter.

Access the Page

1. Click the **Documents** tab.

Document Page Field Descriptions



Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Doc Types	Code indicating type of document attached; i.e. ACL, ADD, etc.
Description	Description of document attached, i.e. Agency Justification, etc.
Attached File/Applies to	File name of the attached document. **Applies to** is a free form field for brief additional comments regarding the document.
Action Date	The date the documents were attached. This field will remain blank until the request has been submitted.
Add	Button that opens another page for browsing to the file name.
Delete	Button that will remove the current file name from the request.
View	Button that allows the documents that have been attached to be viewed.
(Insert Row)	Used for adding another document row to the transaction request.
(Delete Row)	Used to completely remove a document row from a transaction request.
Submit	Button that will submit the entire package to the next approval level.

Work with the Page

To Attach Documents:

1. In the **Doc Types** field, click the to select the appropriate document type, or enter the appropriate code.

2. Click the icon to select the path where the document exists.

3. Click the button to find the document to be attached. Select the document and click **Open** or double click on the document.

4. Click the button to attach the document to the page or click **Cancel** to return to the page without attaching the document.

NOTE: To add additional documents, press the + pushbutton and repeat the above steps.

5. Place the cursor in the empty text box to add any free form comments about the document you attached.

6. When all desired documents have been added, press **Submit** to send the transaction to the next approval level.

To Replace Documents

NOTE: Should the wrong file or file type be attached to a transaction request, a document can be replaced prior to submitting the transaction.

1. Locate the document(s) to be replaced and click the Delete button.

2. The system will remove the file path and name from the page. The document type and any comments added will remain.

3. If necessary, change the document type and edit or remove any comments.

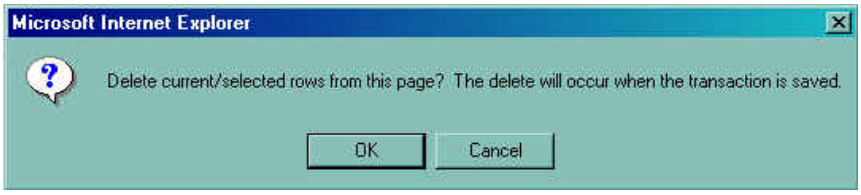
4. Click the Add button to select the path where the replacement document is located and follow the steps for attaching a document as outlined above.

To Delete Documents:

NOTE: Documents can only be deleted prior to the transaction being submitted.

1. Locate the document(s) to be deleted and click the − button.

2. The following message box will appear:



3. Clicking the **OK** button will delete the row immediately.

WARNING: The document row will be deleted immediately upon clicking OK. The delete will not wait until a Save or Submit action!

4. When all desired documents have been deleted, press **Submit**.

Viewing Attached Documents

REMINDER: Certain documents attached by C&C or DOB can only be viewed after the transaction has either been returned for further information or a final determination has been made.

1. Click the **Documents** page tab for any transaction.
2. Click the **View** pushbutton underneath the document you wish to view. The document will open in another window appropriate to the type of transaction being viewed (Word, Excel, etc.).
3. When finished viewing the documents, click File, Close to exit the document.
   *The system brings the user back to the **Documents** page.*